

LEGAL SERVICES PROJECTS AND SUPPORT CENTERS

Electronic Forms Instructions

Read the following instructions carefully before you begin to fill out the reporting forms.

1. **SAVE A COPY OF THESE FORMS:** You will want a “clean” copy in case you need to start over or need to make extra copies for multi-county programs. From the “File” menu, choose “Save As” and save a copy of these forms to your computer. Data entered directly on the web pages containing the documents will not be saved to the web site; they must be saved to your computer.
2. **TO USE THE FORMS:**
 - a. **WORD forms - A & B:**
 - Sections that require “fill-in-the-blank” answers have gray “boxes” and are “protected” – you won’t be able to put your cursor anywhere but the boxes or the “checkboxes” for “checkmark” answers. Use the tab or arrow keys or your mouse to move between boxes. Areas that require narrative answers are “unprotected” and you can type as much information as you may consider necessary. Use the “down arrow” key to move from the bottom of a narrative answer to the next answer space.
 - Answer spaces have extra lines to allow you to fully answer each point. Please delete extra lines that take up extra space as “place holders”, as they can make sections jump to the next page.
 - **Save often!**
 - b. **EXCEL forms - C, D, & E for LSPs only:**
 - **Finding the Forms:** Each form is a separate worksheet within the Excel spreadsheet. Move from form to form by clicking on the corresponding tab at the bottom of the screen. (The tabs resemble file folder tabs.)
 - **Enter Data:** You can input information into the non-shaded cells only. Use the mouse or arrow keys to place the cursor in the cell in which you will enter data. Press the “Enter” key. (All the BLUE cells are “protected” and you cannot input any information into them. Many of the BLUE cells have built-in formulas and will automatically calculate the math for you.)
 - **Editing:** To make corrections, place your cursor in the cell containing the data to be corrected and double-click to access “editing” mode. Make the corrections, and then press the “Enter” key.
 - **Print a Hard Copy:** If you use the print icon, only the form that you are currently viewing will print. To print all the forms (worksheets) at once, select “Print” from the “File” menu. Then, in the “Print What” section of the Print dialog box, choose “Entire Workbook”. (Note, some printers may not print all forms correctly when you choose this option, you may have to print each form individually.)
 - **Save often!**

If you need assistance downloading or copying these forms, please contact us at
415-538-2252 or trustfundprogram@calbar.ca.gov